US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(December 2000)

Overview

The Program Management Services Achievement Report documents the Modernization Partner's ability to effectively provide Leadership and Direction Setting and to execute the processes and services as prescribed in the Modernization Program Plan.

The Leadership and Direction Setting function includes the following:

- Ensure across the enterprise the integration of the business functions, the application architecture required to support the business functions, the organization, and the Program direction
- Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan, revising as appropriate
- Revise Modernization Blueprint in accordance to the Target State Vision and Integrated Sequencing Plan
- Continue to develop relationships with strategic partners and product vendors to support Program initiatives and provide best in business solutions

In addition, the Modernization Partner leadership team is committed to helping SFA deliver to its milestones documented in the Modernization Blueprint Sequencing Plan, as documented below.

Outcomes Achieved:

The Modernization Partner leadership team has performed these functions as demonstrated below:
- ✓ Integration across the enterprise
    - The BI Delivery Team worked with Mod Partner Student Channel and Financial Partner Channel to develop an integrated approach to the FFEL Retirement analysis project. Goal was to ensure that project addressed FFEL DMCS managed by the Students Channel in addition to the other FFEL components.
    - Continued to generate and distribute the Bi-Weekly Scorecard to document progress made to date, identify issues and impact areas across the enterprise, and communicate to all Modernization team members including the Management Council. The input to produce this report is developed by Modernization Partner and SFA business and technical representatives.
- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan

- Delivered the Target State vision. Reviewed Target State Vision with the GMs and updated a revised document incorporating their comments.
✓ Revise Modernization Blueprint
  - Revised the Blueprint based on comments received from Greg Woods, and continued to provide support to produce the final version of the Modernization Blueprint for Greg Woods review. Final delivery is scheduled for mid-January.
✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
  - Continued to work with PSG to plan and coordinate the development of the Operating Partner/SFA Scorecards.
  - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
    - Continued to develop relationships with CSC and EDS to participate in the transition of new systems into a production environment (SFA Intranet, IFAP/Schools Portal and FMS Applications Operations).
    - Continued to work with NCS and KPMG in conjunction with TIVWAN planning activities.
    - Continued working with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects.
    - Coordinate monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
  - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
    - Conducted preliminary discussions with Jenzabar, an Application Service Provider that supports schools with web portal services, to explore the possibility of furthering SFA's portal objectives.
    - Continued to communicate Modernization Program initiatives with individual vendors – Viador, Autonomy and Interwoven - which will utilize their technologies
✓ Overall Leadership and Direction Setting activities included:
  - Continued to chair the DSG and integrated the efforts of the Target State Vision, the Integrated Sequencing Plan, the Modernization Blueprint and program funding around agreed upon priorities.
  - Continued to support SFA Transition Team planning.
  - Attended SFA Traditions training classes in Chicago and Washington, DC to gain deeper insight into SFA culture and history to be applied to the Transformation Process.

Key Milestones Delivered

Based on the Modernization Blueprint Sequencing Plan as of 8/31/00 (see Attachment A), the Modernization Partner has been effective in helping SFA achieve the milestones due for completion during the month of December 2000 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of December 2000.]

Nbr	X-Ref	Project	Milestone
M25	III.A	Common Origination Disbursement (COD)	Preferred Solution Selection

Nbr	X-Ref	Project	Milestone
M42*	I.D	Data Warehouse	Datawarehousing Implementation Business Case (original due date 9/30/00)
M74*	III.A	Common Origination Disbursement (COD)	Implementation Plan

The milestones that were scheduled for completion during the months of September October, November, and December 2000, but were not completed are listed below with the revised completion date identified.

Nbr	X-Ref	Project	Milestone	Revised Date
M5	I.B	CRM Requirements Development	Final Business Recommendation (original due date 10/20/00)	January 10, 2001
M21	II.C.1c	e-Servicing	Requirements Defined (original due date 9/23/00)	February 28, 2001
M22	II.C.1c	e-Servicing	Complete Design (original due date 12/31/00)	February 28, 2001
M31	I.C	Web Portal	Application deployed to Production (original due date 9/30/00)	TBD – resolving integration and testing problems
M37	V.B	Integrated Human Resource System	Initial draft of SFA Competency Model (original due date 12/31/00)	February 23, 2001
M38		SFA University	SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00)	June and July 2001 (pending TO Mod)
M54	I.B	Web Portal	School Portal Release 1.0 (original due date 9/30/00)	TBD – resolving integration and testing problems
M56	III.B	IFAP Replatforming	Replatforming Complete (original due date 9/30/00)	TBD – resolving integration and testing problems

ATTACHMENT A:

Modernization Blueprint Sequencing Plan

(as of 8/31/00)